

Division of Purchasing

Board and Commission Records Retention Schedule of the Records Management Guide

(This Schedule Revised April, 2008)



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http://adm.idaho.gov/purchasing/RecordsCenter/individual_books/Board_and_Commission_Records_Book.pdf

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APPENDIX 9: RECORDS RETENTION SCHEDULE FOR STATE GOVERNMENT AGENCIES

GUIDELINES

A record is recorded information, in any form, including data in computer systems, created or received and maintained by an organization or person in the transaction of business or the conduct of affairs and kept as evidence of such activity.

The following records retention schedule is reviewed and modified, if necessary, on a yearly basis. The schedule is designed to be a reference in designing individualized agency retention schedules and to provide a level of uniformity in records retention throughout Idaho state government. The State Record Center, Department of Administration, should be contacted regarding proposed changes or modifications to the records in this schedule, or if activities of an agency require different retention.

All retention periods are filed by either the fiscal or calendar year. For all UNANNOTATED DUPLICATE COPIES, preferably destroy immediately after administrative need ends by either the fiscal or calendar year.

INTRODUCTION TO RECORDS RETENTION SCHEDULE

This schedule is intended for use within an agency's records management program. Regardless, until an agency creates a version of this records retention series specific to its facilities, these are the accepted and established time frames and limitations that should be adhered to.

Retention Schedule Headings Definitions	
Series #	Number associated with each schedule type
Series Title	A general description of the series
Office of Record	Office that commonly creates the record and holds it during its active period
Retention Period	Time to retain the record; life of the record
Transfer Instructions	Where a record goes after its active period
Archival	<p>A – Indicates the record is or may be permanent and have historic value</p> <p>R – Indicates a required review by the Records Manager to determine value</p>
Vital	X – Record is vital for immediate operation of the office of origin or the institution.
Guidance: Restricted Access	<p>RA – Refers to the security needs of a record series. Must be justified.</p> <p><i>Access to applicable records should be limited to authorized personnel and approved individuals due to privacy and educational interests. Questions about limits should be based on the type of records, its content and the nature of the request for access and use.</i></p> <p>Records may contain, but are not limited to, confidential, personal or proprietary information.</p>
Guidance: Authorities	Federal and State laws, regulations or requirements that pertain to the series. Where not specifically referenced, Idaho Code § 9-337 through 9-347 of the Public Records Law has been applied. Note that there are exemptions for the access requirements of this law. These may be noted as well.

Retention Codes (Refer to Records Regardless of Format; Type May Vary)	
AC	After closed, terminated, completed, expired, settled or last date of contract
AV	As long as administratively valuable
CE	Calendar Year End (December 31 st)
FE	Fiscal Year End (June 30 th)
LA	Life of Asset
PM	Permanent
UA	University Archives
US	Until Superseded

HOW TO USE THESE SCHEDULES

ESTABLISHING A SCHEDULE

This schedule assumes that:

- The person using it is knowledgeable about his/her office or agency's records;
- An inventory of the records of the office or agency will be performed;
- Time will be taken to apply the definitions to the records found on hand; and
- Records will not be destroyed or reorganized without supervision of the agency's Records Manager or consultation with the State Archivist.

FUNCTIONS AND TYPES OF RECORDS

This schedule is intended to address records common to most offices and agencies of the State of Idaho. Not every type of record listed here will occur in every agency. Some agencies will discover they have records that do not appear to fit any of these series. For those records, contact the State Archivist or the agency's Records Manager for guidance.

HIERARCHY OF RECORDS WITHIN AN AGENCY

Put simply, not every office holding a copy of a record is holding the *record copy*. An example is time sheets. The record copy of a time sheet is the one signed and sent to the payroll office. Any copies kept in other offices to confirm later payroll reports (e.g., proper charges to accounts, etc.) are a short-term record, as are any personal copies in other offices. The Office of Record is the payroll office.

When trying to assess the value of a record in the focus area, bear this concept in mind: Where does the ultimate responsibility for a document, report or record lie? There are instances where a record has value for different reasons in different offices. This is the primary reason a physical inventory of records is essential to this process.

WHEN A RECORD SHOULD BE RETAINED LONGER THAN ITS RETENTION

Documents, regardless of format or storage media (e.g., electronic files), associated with any dispute, audit or legal proceeding should not be destroyed or altered without consultation with the agency's Records Manager, General Counsel, Deputy Attorney General or the State Archivist.

CONFIDENTIALITY, RESTRICTED ACCESS AND PUBLIC RECORDS

The need to limit access to a record type does not mean that it is unavailable as a public record.

- Requests for access to public records should be handled by personnel familiar with the requirements of the laws and regulations that apply to the information requested; and
- For some records flagged in this schedule as "RA – Restrict Access," copies can be furnished where restricted information is blocked out or redacted to make it available to a public records request. An example is a contract that may be copied if social security number, names, etc., have been obscured.

Concerns about making records available to a public records request should be addressed to the agency's Records Manager, General Counsel, Deputy Attorney General or the State Archivist.

CREATING AN AGENCY'S RETENTION SCHEDULE

Once an inventory is completed and a summary of the record series which occur in the agency's office has been compiled, based on this general schedule, a set of decisions will need to be made to establish the Office of Record for each record type. **NOTE:** For many common series, like "correspondence," the Office of Record will probably be the "office of origin" until it is time to transfer the inactive years of material to the State Archives. Other records have obvious "homes," like payroll records (Accounting or Payroll) and permanent or long-term personnel files (Human Resources). It should be noted that smaller-scale agencies may find that a central office becomes the Office of Record for many record types because of staffing or the preference of the agency director. For agencies with regional offices around the State, these decisions may seem problematic. However, with a careful focus on the needs of the offices within an agency and by consulting the State Archivist, these decisions can be made to the benefit of all.

One of the established benefits of records management, with improved accountability of the Office of Record, is efficiency, in both expense and time, of being able to retrieve a record when it is truly needed, without multiple copies taking up space throughout an agency or an office.

HOW TO USE THE RETENTION SCHEDULE FORMAT

Please consider the sample inserted below. Microsoft Excel was used to create this version of the retention schedule document. The fields of the table should be adhered to for compatibility with other State agencies and offices within a given agency.

The *Records Retention Form*, an online Excel fill-in form document, may be accessed at http://adm.idaho.gov/purchasing/record_cnt.htm.

SAMPLE RECORDS

Series #	Series Title (Additional Description)	Office of Record	Retention Period & Transfer Instruction (By Year)	Archival (A) or (R)	Vital (X)	Guidance
SG0110	PERIODIC BUDGET REPORTS Monthly or routine reports on the status of agency appropriation accounts and apportionment, excluding Annual Budget Reports.		FE +3, then destroy			
SG1310	LOSS CONTROL INSPECTION REPORTS An annual self-inspection report used to identify potential hazards within the building or on the agency property. This record may also be used as evidence in defense of a claim. <i>GUIDANCE:</i> - Retain by agency until superseded or obsolete, then send to Risk Management.	Risk Manage- ment	US +12, then destroy			
SG18312	STUDENTS - FINANCIAL AID RECORDS - FFEL AND DIRECT LOANS Records related to borrower's eligibility and participation. All audit requirements to be met prior to disposal. <i>GUIDANCE:</i> - AC - End of the award year in which the student last attended. - Retention based on 34 CFR § 668.24		AC +3, then destroy			RA –Access: FERPA, Confi- dential Record.
SG18559	COMPUTER SYSTEMS - HARDWARE DOCUMENTATION Operational and maintenance requirements of computer hardware, such as operating manuals, hardware configurations, control systems. <i>GUIDANCE:</i> - Series may relate to property management schedules.		PM	A	X	RA –Access may be restricted as part of facility security plans.

NOTE: A column may be added for specific agency series numbers to allow for associating a records series with an in-house procedure or policy.

BOARD AND COMMISSION RECORDS

Series #	Series Title (Additional Description)	Office of Record	Retention Period & Transfer Instruction (By Year)	Archival (A) or (R)	Vital (X)	Guidance
SG1501	APPEAL AND REVIEW RECORDS Series documents reviews of decisions made by the board or commission or appeals to the board or commission concerning decisions made by state agencies, local governments, or special districts. Records may include but are not limited to narrative history or description of case; minutes and testimony; exhibits; reports and findings of fact; final orders, opinions, conclusions, or decisions; audio recordings; working papers; hearing schedules and lists of participants; and related correspondence and documentation.		<i>Case Files:</i> AC +3, then PM <i>Working Files:</i> AC, then destroy			
SG1502	BOARD AND COMMISSION MEMBER RECORDS Series documents board and commission activities and serves as a reference source for board and commission members. Records may include but are not limited to correspondence, plans, statements of goals and objectives, minutes, committee reports, budgets, financial statements, reports, and other reference material. Records are often compiled in a notebook for each member.		AC +3, then destroy			

LEGEND:

Retention Codes: **AC**-After closed, terminated, completed, expired, settled or last date of contact; **AV**-As long as administratively valuable; **CE**-Calendar Year End (December 31st); **FE**-Fiscal Year End (June 30th); **LA**-Life of Asset; **PM**-Permanent; **UA**-University Archives; **US**-Until Superseded

Archival: **A**-Record is or may be permanent and have historic value; **R**-Required review by the Records Manager to determine value.

Vital: **X**-Record is vital for immediate operation of the office of origin or the institution

Guidance: **RA**-Refers to the security needs of a record series. Must be justified.

Series #	Series Title (Additional Description)	Office of Record	Retention Period & Transfer Instruction (By Year)	Archival (A) or (R)	Vital (X)	Guidance
SG1503	BOARD AND COMMISSION MEMBERS PERSONNEL RECORDS Series documents the appointment or election and subsequent personnel actions of board and commission members. If the office is appointive, records may include appointment letters from the governor or agency director and confirmation by the Senate if required. If the office is elective, election records may be included. Records may also include but are not limited to résumés; applications; personnel actions; interest forms for executive appointments; job descriptions; employee data sheets; and related correspondence and documentation.		AC +3, then PM			
SG1504	BOARD AND COMMISSION MEETING MINUTES Series documents the official proceedings of the board or commission meetings. Records may include agendas; minutes; meeting notices; items for board action; contested case hearings schedules; committee reports; exhibits; and related correspondence and documentation. Records may also include audio recordings of meetings used to prepare summaries.		AC +3, then PM			
SG1505	BOARD AND COMMISSION FORMATION AND ORGANIZATIONAL RECORDS Series documents the formation and organization of the board or commission. Records may include but are not limited to by-laws; position and policy statements; mission and goal statements; rules and regulations; work plans; and related documentation.		AC +3, then PM			

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SG1506	COMMODITY ASSESSMENT RECORDS Series documents the assessment of fees to handlers, growers, and processors of agricultural products to fund the production and market research, educational, and promotional activities of the agricultural commodity commission. Records include the amount produced or processed and the commission's assessment per unit of production.		AV or 3, then destroy			
SG1507	COMMODITY PROMOTION RECORDS Series documents the activities of the agricultural commodity commission to promote the marketing and sale of agricultural commodities. Records may include newsletters; circulars; advertisements; seminar reports; trip records; promotional statistical reports; marketing budgets; special events records; press releases; and related documentation and correspondence.		AC +3, then PM			

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Series #	Series Title (Additional Description)	Office of Record	Retention Period & Transfer Instruction (By Year)	Archival (A) or (R)	Vital (X)	Guidance
SG1508	COMPLAINT AND DISCIPLINARY RECORDS, INDIVIDUAL Series documents complaints brought against licensed and un-licensed individuals alleging professional practice violations and any resulting disciplinary actions. Types of complaints may include violations of laws, rules, or ethical standards; negligence; practicing outside scope of activities to which licensed; breach of confidentiality; and incompetence. Records may include investigation records; complaint forms; narrative description of complaint; complaint log; complaint disposition; hearings and appeals records; audio tapes; disciplinary actions such as suspension or revocation; and related correspondence and documentation.		AC +5, then destroy			
SG1509	COMPLAINT AND INVESTIGATION RECORDS, ESTABLISHMENT Series documents complaints brought against establishments alleging violation of laws and administrative rules that govern operation of the establishment. Records may include but are not limited to correspondence; description of complaint; case files; legal notices and orders; hearing records; audio recordings and transcripts; license and certificate records; exhibits; investigative reports; working notes and files; investigation committee records, minutes, and agendas; and related correspondence and documentation.		AC +10, then destroy			

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SG1510	CROP PRODUCTION AND ACREAGE RECORDS Series documents the number of acres devoted to production of an agricultural commodity and the amount of production. Records may include but are not limited to crop production register, acreage survey, type of crop, year, total acreage, total production, name and address of grower, and related correspondence and documentation.		AV or 3, then destroy			
SG1511	EDUCATION PROGRAM REVIEW RECORDS Series documents the review of public and private educational programs, including college and university certification programs, to determine if license requirements, continuing education standards, or teacher certification requirements are being met. Records may include but are not limited to correspondence; reports from the college about its faculty, students, and curriculum; catalogs; self-study evaluations; lists of accredited schools; course listings and descriptions; program descriptions and literature; seminar and workshop agendas; and related correspondence and documentation.		AV or 3, then destroy			

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SG1512	EXAMINATION AND ADMINISTRATION RECORDS Series documents the administration of license examinations. Examinations may be administered locally by the licensing board, by an outside examination service, or by a national board. Records may include but are not limited to correspondence with applicants; master copy of exams; development of exam and exam question records; sample exams with answers; examination booklets; and related correspondence and documentation. Records may also include results of the examination including a roster listing student name, ID number, and examination score. Records may include statistical data and analysis of exam scores and statistics on the administration of the exam in other states. Examination scores may also be found in the individual licensee files in Licensing Records.		AC +3, then PM			
SG1513	INCOMPLETE LICENSE APPLICATION RECORDS Series documents the application process that was initiated but never completed by the applicant. Series may include incomplete, pending, inactive, or denied status applications. Series includes the records of applicants whose files may lack one or more of the following: application, fee, documents such as certificate of education, and examination scores. Applicants may also lack the necessary education and experience, have low exam scores, or fail to satisfy other qualifications.		AV or 3, then destroy			

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SG1514	INSPECTION RECORDS, ESTABLISHMENT Series documents inspections of establishments to ensure compliance with laws and administrative rules that govern operation of the establishment. Types of establishments may include mortuaries, cemeteries, crematoriums, funeral homes, or barber and beauty shops. Records may include but are not limited to inspection ledgers; case files; advertisements; contracts; corporation history; inspection reports; license and certificate records; equipment checks; and related correspondence and documentation. <i>GUIDANCE:</i> - AC - After last inspection.		AC +2, then destroy			
SG1515	LICENSEE ROSTERS Series documents persons who are licensed by the board. Records consist of a list which may include licensee name, address, and phone number; license status (current, lapsed, or inactive); type of license; license number; employer name, address, and phone number; method of licensing; dates of initial licensing, renewal, or expiration; audit number; and related documentation. Roster may be published in the form of a directory.		AC +3, then PM			

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SG1516	LICENSING RECORDS, ESTABLISHMENT Series documents the application process and licensing history of establishments regulated by state law and administrative rule. Types of establishments may include cemeteries, barber and beauty shops, mortuaries, crematoriums, funeral homes, pharmacies, animal euthanasia sites, dog kennels, drug manufacturers, or drug wholesalers. Records may include but are not limited to license and certificate records; applications; inspection reports; background investigations; staff résumés; reports; lists of licensed establishments; and related correspondence and documentation. Excluding Real Estate Brokerage Companies.		AC +3, then PM			
SG1517	LICENSING RECORDS, INDIVIDUAL Series documents the process of licensing individuals who have met the professional standards of the licensing board. The licensing process may include application, evaluation, testing, training, licensing, and certification. Series indicates type of license and may include applications; certificate of education or college transcripts; verification of national or out-of-state licensure; examination scores; cashiering information on fees paid; copies of individual licenses; blank licenses and license audit records; verification of work and supervisory experience; résumés; continuing education records; and background investigative reports. Series may also include renewal notices; copies of licenses or temporary permits; special certification or permit documentation; apprentice and intern licensing records; and related correspondence and documentation. Records are arranged alphabetically by licensee name.		LA or 3, then destroy			

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SG1518	LOBBYIST RECORDS Series is used to document lobbyist and lobbyist employer activities. Records may include but are not limited to expenditure reports; registration statements; termination records; guidelines; correspondence; and related documentation. Series includes active, inactive, and terminated files.		AC +3, then destroy			
SG1519	REPORTS AND STUDIES Series provides a record of findings, assessments, recommendations, research activities, studies, accomplishments, goals, and other activities of the board or commission. These reports or studies are reported to the public; the commission's umbrella or oversight agency; other agencies and organizations; the governor or legislature; or the federal government. Series may include project evaluation reports; public surveys; program or plan summaries; progress or performance reports; biennial, annual, or monthly reports; workload studies; photographs; monitoring reports; needs assessment studies; project outlines and schedules; administrative histories; statistics; working papers and drafts; and related correspondence, and documentation. GUIDANCE: - Transfer one copy of final report, product or study to State Archives after 3 years. - AC - Working papers, background documentation and draft material: After final document produced, or as required by government or agency.		<i>Final:</i> AC +3, then PM <i>Working:</i> AC +3, then destroy			

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Series #	Series Title (Additional Description)	Office of Record	Retention Period & Transfer Instruction (By Year)	Archival (A) or (R)	Vital (X)	Guidance
SG1520	SPECIAL COMPLAINT, MEDIATION OR HUMAN RIGHTS CASE FILE Series may include supplemental information. Information covered by Idaho Code §9-340C is exempt from disclosure.		PM			Contact State Archivist.

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